

*This brochure supplement provides information about Leslie Robert Medall that supplements the APFS Wealth Management, Inc. brochure. You should have received a copy of that brochure. Please contact Leslie Robert Medall if you did not receive APFS Wealth Management, Inc.'s brochure or if you have any questions about the contents of this supplement.*

*Additional information about Leslie Robert Medall is also available on the SEC's website at [www.adviserinfo.sec.gov](http://www.adviserinfo.sec.gov).*

## **APFS Wealth Management, Inc.**

Form ADV Part 2B – Individual Disclosure Brochure

*for*

**Leslie Robert Medall**

Personal CRD Number: 3126977

Investment Adviser Representative

APFS Wealth Management, Inc.  
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UPDATED: 08/01/2014

## Item 2: Educational Background and Business Experience

**Name:** Leslie Robert Medall **Born:** 1942

### Educational Background and Professional Designations:

#### Education:

Leslie Robert Medall has not received any higher education degrees after high school.

#### Business Background:

08/2014 - Present	Investment Adviser Representative APFS Wealth Management, Inc.
08/2014 - Present	Registered Representative American Portfolios Financial Services, Inc.
05/2011 - 07/2014	Hybrid RIA Advisor LPL Financial
12/2005 - 05/2011	Advisor Ensemble Financial Services
06/1998 - 12/2005	Registered Representative New England Financial

## Item 3: Disciplinary Information

There are no legal or disciplinary events that are material to a client's or prospective client's evaluation of this advisory business.

#### **Item 4: Other Business Activities**

Leslie Robert Medall is a registered representative and a licensed insurance agent for long term care insurance sales. From time to time, he will offer clients advice or products from this activity. Clients should be aware that these services pay a commission and involve a possible conflict of interest, as commissionable products can conflict with the fiduciary duties of a registered investment adviser. APFS Wealth Management, Inc. always acts in the best interest of the client; including in the sale of commissionable products to advisory clients. Clients are in no way required to utilize the services any representative of APFS Wealth Management, Inc. in such individual's outside capacity.

#### **Item 5: Additional Compensation**

Leslie Robert Medall does not receive any economic benefit from any person, company, or organization, other than APFS Wealth Management, Inc. in exchange for providing clients advisory services through APFS Wealth Management, Inc..

#### **Item 6: Supervision**

As a representative of APFS Wealth Management, Inc., Leslie Robert Medall works closely with supervisor Robert J Bartolotta, and all advice provided to clients is reviewed by this supervisor prior to implementation. Robert Bartolotta can be reached at (585) 348-9525. Leslie Robert Medall adheres to all required regulations regarding the activities of an Investment Adviser Representative and follows all policies and procedures outlined in the firm's policies and procedures manual, including the Code of Ethics, and appropriate securities regulatory requirements.